

POSITION DESCRIPTION

IMPORTANT: PLEASE READ INSTRUCTIONS ON PAGES 2 and 3

OSER-DMRS-10 (Rev. 08-2013)
State of Wisconsin
Office of State Employment Relations

1. Position No. 330066	2. Cert / Reclass Request No.	3. Agency No.
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4. NAME OF EMPLOYEE

5. DEPARTMENT, UNIT, WORK ADDRESS

DATCP-DMS
2811 Agriculture Drive
Madison, WI 53718

6. CLASSIFICATION TITLE OF POSITION

Budget & Policy Analyst Div-Adv

7. CLASS TITLE OPTION (to be filled out by Human Resources Office)

8. NAME AND CLASS OF FORMER INCUMBENT

Bethany Burns; Budget & Policy Supervisor Div-Adv

9. AGENCY WORKING TITLE OF POSITION

Division Operations Manager

10. NAME & CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES

11. NAME AND CLASS OF FIRST-LINE SUPERVISOR

Michelle Wachter, Administrator

12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?

13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS?
IF YES, COMPLETE AND ATTACH A SUPERVISOR EXCLUSION ANALYSIS FORM (OSER-DCLR-84).

Yes ☐

No ☒

14. POSITION SUMMARY – PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:

-See attached

15. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION (Please see sample format and instructions on Page 3.)

- GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
- WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
- TIME %: Include for goals and major worker activities.

TIME %

GOALS AND WORKER ACTIVITIES

(Continue on attached sheets)

-See attached

16. SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION (See Instructions on Page 2)

- The supervision, direction, and review given to the work of this position is ☐ close ☐ limited ☒ general.
- The statements and time estimates above and on attachments accurately describe the work assigned to the position.
(Please initial and date attachments.)

Signature of first-line supervisor

Michelle Wachter

Date 3/21/16

17. EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position.
(Please initial and date attachments.)

Signature of employee

Date

18. Signature of Human Resources Manager

Deborah Schenck

Date 3/9/16

DISTRIBUTE COPIES OF SIGNED FORM TO:

☐ P-FILE

☐ SUPERVISOR

☐ EMPLOYEE

☐ CERT REQUEST COPY

PURPOSE OF THIS POSITION DESCRIPTION FORM

Employees and supervisors should be aware of the purpose of the Position Description (PD) before completing the form. The PD is the key document in determining the appropriate classification and FLSA status of a position. It is descriptive of the major goals and worker activities of the position. It is not construed to limit or modify the power of the appointing authority and subordinate supervisors to assign work to employees. However, the appointing authority, subordinate supervisors and employees are responsible for assuring that the work assigned is the work actually performed and that PDs are reasonably current descriptions of the work. It is used as an information source for the development and implementation of an effective recruitment and selection plan if a position becomes vacant. Perhaps most important in the long run, an accurate PD helps the employee know what is expected by clearly defining the work to be performed in relation to the overall goals of the work unit. The PD can also be the basis for identifying training needs and criteria for evaluating performance.

NOTE: The PD is to be filled out by the first-line supervisor or his/her designee. Most of the items are self-explanatory. If you have a question on an item, please contact your agency personnel office. Whenever this PD accompanies a personnel transaction, a current organization chart of the work unit should be included. This chart should show the employees' names, superior-subordinate relationships, classifications and current pay schedules/ranges.

INSTRUCTIONS FOR ITEM 7 (Class Title Option), Item 14 (Position Summary), Item 15 (Goals and Worker Activities), and Item 16 (Supervision and Review).

Item 7: The Class Title Option is to be filled in by the Human Resources Office. The Class Title Option is not a working title. It is a generic subtitle which has been approved by OSER and is to be used to more specifically identify a position for recruitment, examination and certification or layoff when job analysis has shown that the special character and qualifications of the position so necessitate.

Item 14: Position Summary Statement: This is a summary of the goals of the position plus additional information that applies to the entire position such as the level of supervision, authority and discretion; the types of contacts; the physical location, or the context (i.e., position in the process flow, formal name and nature of the program, nature of the organization, etc.). (see sample statement on page 3)

Item 15: DEFINITIONS

Goals are the expected results of each employee's work. They are the expected accomplishments, product or output that results from the work activities of the employee.

Worker Activities are the specific tasks the employee performs to accomplish the goals. Worker Activity statements describe what a worker actually does.

% Time is the proportion of the employee's total work time spent on a goal or worker activity annually.

INSTRUCTIONS—The steps below should be followed in completing Item 15.

1. List the **goals** of the position in descending order of importance. Each PD will usually contain between two and six goals. Identify each goal by the use of a capital letter as shown on page 3.
2. Under each goal list the **work activities** performed to accomplish sufficient information to make them understandable to a person not familiar with the field of work performed. Avoid indefinite terms such as "handle," "assist," or "process." Generally there will be an average of five worker activities per goal, but there may be as few as two or as many as necessary. Identify each worker activity by the letter of the related goal and the sequential number of worker activity as shown on page 3. If a worker activity relates to more than one goal, the second time it is used you should cross-reference this worker activity by listing the original goal letter and worker activity number (i.e., "A3" in example on page 3) under the goals it relates to.
3. If the position being described is considered to be "confidential," "managerial," or "supervisory" in nature for collective bargaining purposes; you should insure that the goals and worker activities listed explicitly describe this nature of the work.
4. In the **% Time** section, estimate the percentage of time spent working toward each goal annually. The percentages for the goals should add up to 100%. Also, where possible, estimate the percentage of time spent on each worker activity, particularly ones which constitute 10% or more of the total workload. Percentages for worker activities should be based on how much of the total (100%) job is spent on the worker activities and not on how much that worker activity contributes to a single goal.
(SEE ABBREVIATED SAMPLE ON PAGE 3)

Item 16: Check the box which best describes the type of supervision given this position. "Close" supervision implies that the work is performed according to detailed instructions and the supervision is available on short notice. "Limited" supervision implies that the incumbent proceeds on his/her own initiative while complying with policies, practices and procedures prescribed by the supervisor. The supervisor generally answers only on the more important phases of the work. "General" supervision implies that the work is performed independently. The incumbent seldom refers matters to supervisor except for clarification of policy.

POSITION SUMMARY

This position performs professional work providing both biennial and operating budget preparation and management in consultation with the Division Administrator and Bureau Directors in a wide variety of management areas. The position incumbent has wide latitude in planning and making program area related decisions, some of which are guided by laws, rules and departmental policy. Position performs operational budget preparation and maintenance of accounts throughout the fiscal year.

Employee oversees and performs policy analysis work, participating in division management meetings involving major budget and policy decisions. For grants awarded to the Division, the position works closely with the federal USDA offices and the Department's Bureau of Finance to ensure that grant money is properly spent and accounted for. The position plays a major part in personnel activities and issues in the division, serving as the division liaison with the department's Bureau of Human Resources. Position is responsible for providing interpretations of departmental and division administrative policies to staff in carrying out their assigned functions. Position may work on a variety of special projects assigned by the Administrator (e.g., developing and implementing administrative policies & procedures, planning analyst activities, etc.).

The position performs complex financial records processing using state budget systems, forms management, and participates in development of office management priorities and division objectives.

GOALS AND WORKER ACTIVITIES

40% Goal A: Coordinate and participate in the development and administration of the biennial and annual operating budget. Operate as the division budget manager.

- A.1 Function as the division's budget manager in charge of directing, implementing and coordinating the DMS program budgets, including the Bureaus of Laboratory Services and Information Technology.
- A.2 Participate in coordination of the biennial budget process in the Division. This includes working with the Division Management Team and other special department budget teams to discuss and prepare biennial budget required forms and information.
- A.3 Attend and participate in all budget meetings for the division. Meetings may concern: Rules handed down from the Secretary's office for budget preparation; federal funding changes that affect the division and department; budget decisions imposed on the department that need division action, input, etc.
- A.4 Review monthly budget reports generated by the department's Finance office and the detailed expenditure ledgers generated by the Department of Administration (verify amounts/balances, notify the Department budget office of necessary correction transfers due to misappropriation assignment, overspending on budget lines or unforeseen or projected line shortages/deficits).
- A.5 Develop, submit and negotiate Federal grants with federal program officials dealing with the Bureau of Laboratory Services. Discuss and provide information regarding division budgets, program needs and State financial practices. Direct and manage the revenues and billings of other division federal grants and contracts.
- A.6 Act as Division contact in assisting Federal review auditors and Legislative Audit Bureau auditors by providing information and explaining division budget practices and procedures.
- A.7 Prepare budget status reports for the Administrator, Bureau Directors, Program Managers, and Executive Staff and Secretary. Provide written narratives indicating areas of concern, basis for future projections and recommendations including strategies to resolve or correct potential shortfalls or other budget concerns.

Budget & Policy Analyst Division – Advanced

- A.8 Review and analyze division budget with department fiscal officer and budget analyst to discuss an overview of the budget and areas of concern. Prepare requests for additional spending or position authority (e.g., 1310s or 1654s for items such as project position requests) in consultation with division program managers.
- A.9 Direct division-wide purchasing and payments. Provide support staff with information on the assignment of correct appropriations for payments and deposits. Approve division purchase orders and vouchers for all division activities. Discuss and make decisions on new or unusual purchase requests with management and line staff.
- A.10. Work with bureau directors to ensure that revenues via chargebacks are being transferred and deposited correctly and all applicable processes are being adhered to.
- A.11 Communicate in conjunction with the Bureau of Finance, the budget status to the division Administrator and Bureau Directors concerning the management of the division's operating budget. Make recommendations, develop strategies and ask for feedback. Implement spending changes based on management team decisions.
- A.12 Participate in the analysis of division program fee/chargeback structures and impact. Conduct cost analyses and research trends in the program area in consultation with the program managers.

35% Goal B: Oversight and performance of division policy analysis and related rule making activities.

- B.1 Direct or perform analysis and monitoring of division policies and practices affecting the agency. Formulate options and develop policy or program recommendations to support decision-making by Division management. Note: This position is actively involved in not only developing recommendations, but also in the decision-making and implementation process regarding the Division's policy initiatives and assists in the entire process for agency wide policy.
- B.2 Evaluate internal emerging issues, interpreting their impact on Division programs and making recommendations for changes in program direction or operation.
- B.3 Serve as an advisor to the Administrator, other management staff, or legal on division and agency policy issues.
- B.4 Prepare or coordinate the preparation of policy documents, including issue papers, reports, and division initiatives.
- B.5 Lead the agency policy review team. Oversee and/or analyze policy proposals affecting agency and division programs.
- B.6 Perform other policy related duties as requested by the Administrator.

10% Goal D: Provision of personnel management and related activities to the division.

- D.1 Act as division liaison with the Agency Human Resources office on a variety of personnel topics (e.g., Leave Without Pay, Family and Medical Leave Act, Outside Employment, etc.)
- D.2 Perform functions to fill all Division vacancies which includes: submit requests to staff based on Administrator direction; provide input on position classification or work needs, coordinate and assist with recruitment activities (e.g., prepare PAR forms, place LTE or permanent job ads, consult on exam/interview topics, schedule interviews, etc.); prepare hire paperwork and office logistics (e.g., phone & computer set up); etc.

- D.3 Provide orientation for all new Division employees which includes: explanation of all benefits, administrative policies, completion of personnel forms, etc.
- D.4 Serve as a liaison to HR and obtain guidance to when employee relations items arise (e.g., explain grievance or complaint processes to staff, provide Compensation Plan or contract interpretations to management staff; direct the preparation and file maintenance of disciplinary records, etc.
- D.5 Regulate the career development training program practices in the division. This would include: guiding supervisors as to the necessary criteria needed for reclassification purposes, timeliness, employment relations standards, etc.
- D.6 Coordinate the preparation of current position descriptions and/or standards for each division position. Serve as a liaison with HR and program managers regarding the drafting of position descriptions or other classification issues.
- D.7 Provide assistance to HR with classification or survey review activities, completing cost analyses as requested or providing position/budget data during periods of contract negotiation when DAH positions may be affected.
- D.8 Represent the Division as personnel witness on personnel related issues before the Wisconsin Employment Relations Commission or the courts as appropriate.
- D.9 Maintain confidential personnel file for each employee in the Division; monitor completion of performance evaluations as needed (e.g., annual evaluations, probationary reviews, etc.).
- D.10 Prepare Division hiring plans and coordinate implementation with each Bureau.

5% Goal E: Act as and perform functions as the Agency Privacy Officer.

- E.1 Participate as a member of the state's Privacy Council working with other agencies to identify and define consistent privacy practices and policies among state agencies.
- E.2 Coordinate agency practices relating to DATCP operations and privacy practices and rules governing agency programs.
- E.3. Meet with division privacy representatives to ensure consistent privacy practices and messages throughout the agency. This includes training new division's representatives as well as providing outreach information to all staff in the practices of the agency.

10% Goal G: Performance of other program and office management work as assigned.

- G.1 Serve as office manager. Work involves making arrangements for electrical and telephone work, develop and maintain office layout and floor plan, arrangement of office layout to allow for change in office staff and equipment, obtaining estimates and negotiate terms for contractual work, monitoring work through completion and direct payment.
- G.2 Provide oversight to forms management for the division, including: review of needed revisions, directing support staff to implement revisions, forms record-keeping, and assuring that record retention and disposal agreements are followed.
- G.3 Provide orientation and training to other office staff on financial transactions and agency systems (e.g., purchase orders, STAR, payments).

- G.4 Compile and report on division's monthly metrics.
- G.5 Update the intranet with DMS changes and/or additions to practices, policies and general information.
- G.6 Maintain and update the agency Employee Handbook.
- G.7 Other duties as assigned.

KNOWLEDGE AND SKILLS REQUIRED:

1. Comprehensive knowledge of budget development and administration, including skill in auditing records.
2. Considerable knowledge of fiscal methods and basic accounting procedures. This includes purchasing, payments, revenue tracking, etc.
3. Knowledge of grants administration, including filing and reporting requirements.
4. Considerable ability to effectively communicate verbally and in writing.
5. Knowledge of project planning, policy evaluation and program management techniques.
6. Knowledge of Division and State licensing requirements, money handling and auditing.
7. Effective computer skills, including knowledge of Microsoft Products (e.g. Excel, Word and Access).
8. Ability to learn and manage agency services programs (e.g., risk management, emergency services, facilities, etc.)
9. Working knowledge of office layout and design needs.
10. Considerable knowledge and the ability to organize work and analyze reports.
11. Working knowledge of personnel policies, practices and procedures.
12. Working knowledge of the state compensation plan and collective bargaining agreements.
13. Considerable knowledge of administrative practice and procedures necessary to plan, implement and coordinate a variety of major programs at the division level.
14. Knowledge of the state accounting systems

PERSONAL CONTACTS AND THEIR PURPOSE: Considerable contact with staff and managers in the Division of Management Services (DMS) (e.g., Finance, Human Resources, IT) and other divisions on a daily basis to carryout the administrative policies and directives as well as to ensure effective processing of DMS requests/transactions.

This position will on occasion meet with the Department of Administration, Legislative Fiscal Bureau, or other state officials to discuss division budget and/or personnel matters. Occasional meetings with federal officials, university staff, private industry representatives, or other individuals interested in division programs may be required.

Work is coordinated through phone calls and/or personal contacts to provide program and division information.

DISCRETION AND ACCOUNTABILITY: This position provides confidential administrative assistance to the Administrator and other division managers. Programs are generally conducted within the broad guidelines of Wisconsin laws and operational procedures. This position further manages the process for filling all division vacancies and serves as a liaison to HR on personnel matters. The position develops and maintains DMS Policies and Procedures, including form or procedure revision, records management, etc.

WORK ENVIRONMENT: This is primarily an office position, but may have occasional travel for meetings or other assignments from the Administrator. Occasionally, problems develop which create a conflict environment which must be resolved in meeting the Department's goals and objectives and also be able to maintain good public image.

BPA DIV-ADV (DMS) 3-2016

